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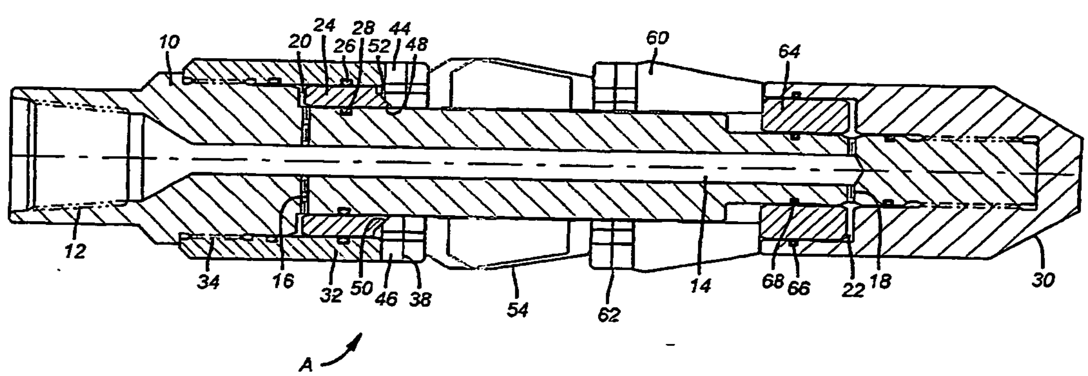
(54) Title: COMPLIANT SWAGE



(57) Abstract: A compliant swage (A) has the ability to change shape to allow clearance of an obstruction while permitting expansion to go on in other areas removed from the obstruction. A series of segments (40, 42) move with respect to each other longitudinally to change overall size. The segments have an additional degree of freedom to change from a round profile of varying diameter to an oblong, elliptical, or an irregular shape so as to compensate in the portion that encounters an obstruction to let the swage pass while at the same time permitting the intended maximum expansion in other portions where conditions permit such expansion.

WO 2004/079157 A1

APPLICATION FOR PATENT

Title: Compliant Swage

Inventors: John L. Baugh and Leopoldo S. Gomez

FIELD OF THE INVENTION

[0001] The field of the invention is expansion of tubulars and more particularly the use of a compliant swage that can expand the tubular while compensating for tight spots where expansion cannot take place.

BACKGROUND OF THE INVENTION

[0002] Tubulars are expanded for a variety of reasons. In one application a patch is expanded to repair cracked casing. In other applications tubulars or liners are expanded to connect to each other or to casing downhole to present a larger cross-sectional area for a segment of the well. In other applications, deformation or a collapse of casing from forces of the surrounding formation needs to be corrected to improve the borehole cross-sectional area in the affected zone.

[0003] Swages have been used to accomplish this task. Swages are generally a tapered shape coming to a fixed maximum diameter such that when pushed or pulled through the obstructed area results in making the tubular either resume its initial round dimension or expand the tubular into an even larger round dimension. More recently swages that could change circular dimension were disclosed by the inventors of the present invention in a U.S. provisional application filing on February 11, 2002 having serial number 60/356,061. That design allowed connected segments to move longitudinally with respect to each other to vary the circular maximum diameter of the swage. This ability had the advantage of changing size in the face of an obstruction to avoid sticking the swage or overloading the swage driving apparatus. This device had the capability of reducing to a smaller diameter to allow clearing of an obstruction. Its limitation was that if a tight spot adjacent the outside of only a part of the circumference of the tubular to be expanded was encountered, the swage reduced its diameter symmetrically to clear the obstruction. This resulted in a decrease in cross-sectional area beyond the amount necessary to clear the localized obstruction.

[0004] The present invention presents a compliant swage that has enough range of motion among its components to provide sufficient articulation to let the swage go out of round in profile. This permits a part of the swage to reduce in dimension at the localized obstruction while in the remaining regions where there is no such resistance, the expansion can continue as the swage advances. The net result is a larger cross-sectional area can be obtained than with the prior design and the obstruction can still be cleared. These and other advantages of the present invention will become more apparent to those skilled in the art from a review of the description of the preferred embodiment and the claims, which appear below.

SUMMARY OF THE INVENTION

[0005] A compliant swage has the ability to change shape to allow clearance of an obstruction while permitting expansion to go on in other areas removed from the obstruction. A series of segments move with respect to each other longitudinally to change overall size. The segments have an additional degree of freedom to change from a round profile of varying diameter to an oblong, elliptical, or an irregular shape so as to compensate in the portion that encounters an obstruction to let the swage pass while at the same time permitting the intended maximum expansion in other portions where conditions permit such expansion.

DETAILED DESCRIPTION OF THE DRAWI NGS

[0006] Figure 1 is a section view of the swage assembly in the run in position;

[0007] Figure 2 is the view of figure 1 in the beginning to swage position;

[0008] Figure 3 is a detail of a pair of segments that are upwardly oriented and an adjacent par that is oppositely oriented;

[0009] Figure 4 is a section view through lines 2-2 of Figure 2;

[0010] Figure 5 is the view of Figure 2showing the expansion proceeding prior to encountering an obstruction;

[0011] Figure 6 is the view of Figure 5 just as an obstruction is about to be encountered;

[0012] Figure 7 is a section view along lines 7-7 of Figure 2 when an obstruction is encountered;

[0013] Figure 8 is a perspective view of two adjacent segments showing how they connect to each other in a tongue and groove manner;

[0014] Figure 9 is the view from the opposite end as compared to Figure 8;

[0015] Figure 10 is a perspective view of the assembled segments in the maximum dimension position;

[0016] Figure 11 is the view of Figure 10 in the minimum dimension position during run in;

[0017] Figure 12 shows an alternative embodiment where the segments abut in acrcuate contact and the segments are in a round configuration;

[0018] Figure 13 is the view of Figure 12 after an obstruction is encountered and the segments have moved to an out of round shape to clear the obstruction;

[0019] Figure 14 is an alternate embodiment to Figure 3 where a single segment is connected at the T-shaped connection instead of a pair of segments; and

[0020] Figure 15 is the mating segment to Figure 14 in the alternative embodiment to Figure 12 where the segments have arcuate edge contact and a single segment rather than a pair is connected at a T-shaped connection.

DETAILED DESCRIPTION OF THE PREFERRED EMBODIMENT

[0021] Figure 1 shows the preferred embodiment of the swage apparatus **A** of the present invention. It has a mandrel **10** with thread **12** for connecting tubing or some other driving mechanism (not shown). Passage **14** has lateral exits **16** and **18** to communicate applied pressure to annular cavities **20** and **22** respectively. Rounding piston **24** is sealed by seals **26** and **28** so that pressure in cavity **20** urges rounding piston **24** toward lower end **30** of the apparatus **A**. Swage anchor **32** is held at thread **34** to mandrel **10**. Near its lower end **36** there are a plurality of preferably T-shaped openings **38**, although other shapes can be used.

[0022] Referring to Figure 3 swage segments **40** and **42** have C-shaped upper ends **44** and **46** respectively so that when brought together the adjacent upper ends **44** and **46** take on a T-shape that is designed to fit loosely in T-shaped openings **38** in swage anchor **32**. Referring to Figures 1 and 9, it can be seen that upper ends **44** and **46** respectively include beveled surfaces **48** and **50** onto which the beveled lower end **52** of swage anchor **32** is brought to bear.

[0023] The assembly that comprises the compliant swage **54** is partially shown in a flattened view in Figure 3 and in perspective in Figure 11, during the run in procedure.

[0024] Figure 11 shows a pattern of pairs of segments **40** and **42** that are attached to swage anchor **32** interspersed with segment pairs **56** and **58** that are attached below to the fixed diameter swage **60** through generally T-shaped openings **62**. Openings **62** are the mirror image of openings **38** and serve a similar function. Referring to Figure 1, the optional swage **60** is biased by preload piston **64**. Seals **66** and **68** seal piston **64** in cavity **22** so that pressure through passage **18** drives piston **64** and segment pairs **56** and **58** in an uphole direction toward thread **12**. That same pressure in passage **14** drives the rounding piston **24** downhole toward lower end **30** and into beveled surfaces **48** and **50** of each segment pair **40** and **42**.Force to move the rounding piston **24** may be provided by mechanical springs or other means. Rounding piston **24**, in the absence of an irregular obstruction downhole, forces the segments **40, 42, 56** and **58** into a circular shape shown in Figure 4, due to the contact between beveled surface **52** with its corresponding beveled surfaces **48** and **50** on segment pairs **40** and **42**. The swage **60** is optional and piston **64** can bear directly on segment pairs **56** and **58**, without departing from the invention. Alternatively, the bias provided hydraulically by piston **64** can be provided by other means such as mechanically by a spring or a stack of Belleville washers, for some examples. In some configurations all the required preload will be provided by the fixed swage **60**.

[0025] Figure 1 illustrates a run in position with preferably no pressure in passage **14**. In that case there is no uphole pressure from piston **64** and segment pairs **56** and **58** are in their lowermost position so that the compliant swage assembly is at its minimum dimension. This position is best seen in the perspective view of Figure 11. Ridgelines **70** and **72** on segment pairs **56** and **58** are longitudinally offset from

ridgelines **74** and **76** on segment pairs **40** and **42**. This should be compared with the swaging position shown in Figure 10. In this view, fluid pressure is applied in passage **14** pushing piston **64** uphole and with it segment pairs **56** and **58**. The ridgelines **70**, **72**, **74** and **76** align in a circular configuration, as shown in Figure 4. The circular configuration is promoted by the wedging action from beveled lower end **52** of rounding piston **24** forcing the segment pairs **40** and **42** into such a shape. Since all the segment pairs are interconnected, as will be described, the compliant swage assembly **54** as a whole assumes a circular shape for the purpose of swaging at the pre-designated maximum dimension, illustrated in the perspective view of Figure 10.

[0026] Figure 4 shows a mode of interconnection. Every segment preferably has a tongue **78** on one edge and a groove **80** on the opposite edge. On either side of each tongue **78** are surfaces **82** and **84**. On either side of groove **80** are surfaces **86** and **88**. Surfaces **84** and **88** define a gap **90** between them and surfaces **82** and **86** define a gap **92** between them. These gaps allow articulation between adjacent segments so that the circular shape shown in Figure 4 for swaging at maximum dimension uniformly until an exterior obstruction is met can change into an out of round shape shown in Figure 7. To assume the shape of Figure 7, some of the gaps **90** have closed completely while gaps **92** between the same two segments have opened fully in zones **94** and **96**. At the same time, in zones 98 and **100** the movement is opposite. The compliant swage assembly **54** has now taken a somewhat oval shape in departing from the optimal round shape. It should be noted that depending on the allowable dimensions of gaps **90** and **92** a greater or lesser amount of articulation is possible. There are several limiting factors on the amount of articulation provided. One is the strength of the connection between a tongue **78** and an adjacent groove **80**. Another, is the desire to keep the outer gaps **92** to a minimum dimension for the reason that large gaps can allow opposed edges such as **102** and **104** to concentrate stress in the expanded tubular by putting line scores in it. Depending on the amount of expansion and subsequent service, such scoring and stress concentration can result in premature cracking of the expanded tubular. Figures 4 and 7 illustrate that the articulated swage assembly **54** is held together at maximum dimension of Figure 4 or in an out of round articulated shape to allow the expansion of the tubular to the maximum dimension where no resistance is encountered while allowing inward articulation to clear the obstruction in the zone where it is encountered. The net result

is a larger expanded cross-section of the tubular where the obstruction occurs than would have been possible with the prior design that simply transitioned from a larger circle to a sufficiently smaller circle to clear the exterior obstruction. Another limiting issue on the amount of articulation is the tubular being expanded. There are limits that the tubular can endure in differential expansion between its various zones to clear an obstruction. The design of Figures 4 and 7 represent one solution to the need to hold the segments together while permitting articulation to achieve a desired swaging shape change. Clearly the tongue and groove connections hold the assembly of segments together as they are moved from the run in position of Figure 1 to the onset of swaging position shown in Figure 2 with pressure applied to passage **14**.

[0027] Figures 12,13,14 and 15 show an alternate design. The segments are no longer in pairs as shown in Figure 3; rather a segment **110** has a T-shaped connection **108** to be inserted into an opening **38** in swage anchor **32**. Abutting on either side is a segment **106** that is oppositely oriented and connected to swage **60**. The interface between the segments **106** and **110** is no longer a tongue and groove. Rather, each interface is a pair of arcuate surfaces **112** and **114** to allow the assembly articulate from the originally round shape shown in Figure 12 to an out of round shape shown in Figure 13 to clear an obstruction external to the tubular being expanded. The end connections of the segments **106** and **110** respectively to swage anchor **32** and swage **60** are made deliberately loose to permit relative movement between surfaces **112** and **114** to permit the articulation to the desired shape to avoid the obstruction exterior to the tubular being swaged. One notable difference is that there are no gaps in the periphery **116** where the swaging action is taking place regardless of the configuration of the segments in the round or out of round positions shown in Figures 12 and 13. Those skilled in the art will appreciate that band springs or equivalents can be used to limit the outward movement of the segments **106** and **110** as the interacting arcuate surfaces **112** and **114** do not provide such an outward travel stop. Even using the interface of Figures 12 and 13, the minimum and maximum dimensions of the compliant swage assembly **54** shown in Figures 1 and 2 are still achieved by relative longitudinal movement between the segments oriented uphole and those that are oppositely oriented. The total number of segments is fewer in the Figures 12,13,14 and 15 version but greater numbers of segments can also be used. For example, segment pairs as shown in Figure 3 can be used with the arcuate edge interfaces,

within the scope of the invention. Conversely, as shown in Figure 14 the segment pairs of Figure 3 can be cut in half using larger segments that still employ an edge connection using a tongue and groove or another mechanically equivalent arrangement.

[0028] The method of using any of the above-described configurations can be seen by initially looking at Figure 1 for the run in position. At this time there is no pressure applied in passage **14** and the piston **64** and with it the swage **60** and the connected segments, such as **56** and **58** are in their lowermost position, simply due to their own weight. The compliant swage assembly 54 is in the Figure 11 position with ridgelines **70** and **72** out of alignment with ridgelines **74** and **76**. The compliant swage **54** is therefore in its minimum diameter position. Those skilled in the art will realize that the expansion can occur along the aligned ridge lines, as shown in Figure 10 or along a surface as opposed to a line contact shown in Figure 10. The Figure 10 position is achieved by putting pressure from the surface in passage **14** to push swage **60** uphole and to force rounding piston **24** down on beveled surfaces **48** and **50**. This latter action puts the compliant swage in a round configuration illustrated in Figure 4 for the start of swaging. This position of the apparatus A is shown in Figure 2. If used, the fixed swage **60** enters the tubing to be expanded first. If it will not pass, the apparatus A must be retrieved. Once it passes, the compliant swage assembly **54**, now in the Figure 10 position due to pressure in passage **14**, makes contact with the tubular to be expanded. The segments remain in the round position shown in Figure 4 as long as there is no external obstruction to expansion of the tubular, as is shown in Figure 5. When a restriction or obstruction is reached, as shown in Figure 6, the compliant swage assembly **54** will articulate to change dimension to try to pass the obstruction by getting smaller in the zone where the obstruction is found and swaging as large as possible where the obstruction is not present. This articulation occurs with pressure continuing to be applied in passage **14**. If the tongue **78** of one segment is engaged to a groove **80** in an adjacent segment, relative rotation about an axis defined by the tongue in groove connection permits the articulation as the size of gaps **90** and **92** between the affected segment pairs begins to change. In the abutting arcuate surfaces design shown in two positions in Figures 12 and 13, relative rotations along the arcuate surfaces **112** and **114** results in the desired articulation while presenting a continuous and uninterrupted surface or edge **116** for continued swaging despite an

obstruction. In the end, if the compliant swage assembly **54** can actually pass through the obstruction, the resulting cross-sectional area of the expanded tubular is larger than it otherwise would have been if its circular cross-section had been maintained but its dimension reduced to the point where the obstruction could have been cleared. Clearly the larger the number of segments in the compliant swage assembly **54** the better its ability to articulate. However, the maximum round diameter of the compliant swage assembly **54** and the required strength of the segments to actually do the swaging required will have an effect on the number of segments to be employed.

[0029] Those skilled in the art will appreciate that surfaces **112** and **114** do not have to be singular arcs or have the same radius. They can be a series of surfaces and have different curvatures. The illustrated embodiment is illustrative of the inventive concept of articulation in combination with nearly continuous edge or surface contact. The alternative articulation concept is also illustrative of the ability to articulate but allowing some gaps in the swaging line or surface contact to accomplish the desired articulation.

[0030] The foregoing disclosure and description of the invention are illustrative and explanatory thereof, and various changes in the size, shape and materials, as well as in the details of the illustrated construction, may be made without departing from the spirit of the invention.

We claim:

1. An adjustable swage for use on a downhole tubular, comprising:

a rounded body mounted to a mandrel wherein said body is movable into a plurality of positions to create a variety of profiles effective for a full 360° about said mandrel.

2. The swage of claim **1**, wherein:

said profiles comprise circular and non-circular shapes.

3. The swage of claim **1**, wherein:

said round body comprises a plurality of articulated components that allow the profile to be reduced in response to a portion of the tubular that resists expansion while permitting a larger profile dimension in other parts of the tubular where there is no such resistance.

4. The swage of claim **3**, wherein:

said articulated components present no gaps along said profile.

5. The swage of claim **3**, wherein:

said articulated components present gaps along said profile.

6. The swage of claim **3**, wherein:

said articulated components move relatively to each other to change the dimension on at least a potion of said profile.

7. The swage of claim **6**, wherein:

said articulated components rotate on adjacent edge arcuate surfaces.

8. The swage of claim **7**,further comprising:

a retention device mounted around said articulated components to hold them together.

9. The swage of claim **6**, wherein:

said articulated components are retained to each other within said profile.

10. The swage of claim **9**, wherein:

pairs of said articulated components are retained to each other by a tongue and groove connection.

11. The swage of claim **10**, wherein:

said tongue and grove connection has a longitudinal axis whereupon adjacent articulated components that are secured by said tongue and groove connection can rotate with respect to each other about said longitudinal axis of said tongue and groove joint.

12. The swage of claim **11**, wherein:

gaps along said profile close to reduce its dimension to clear an obstruction while gaps widen to increase said profile in other location to achieve, in other zones where there is insufficient resistance, the desired expansion of the tubular.

13. The swage of claim **1**,wherein:

said body is formed of a plurality of abutting segments movable with respect to each other.

14. The swage of claim **13**,wherein:

said segments each comprise a high location and at least some of said segments are movable to selectively align said high locations to obtain a maximum diameter or to offset them to attain a minimum diameter.

15. The swage of claim **13**,wherein:

said mandrel has a longitudinal axis and said segments slide relatively to each other in the direction of said longitudinal axis.

16. The swage of claim **15**,wherein:

said segments are retained to each other while moving relatively to each other in a longitudinal direction.

17. The swage of claim **16**,wherein:

said segments are retained to each other at their abutting edges by a tongue and groove connection.

18. The swage of claim **13**,wherein:

said segments are wedge shaped having a narrow end and a wide end and are arranged in an alternating pattern where the narrow end of one segment, in a first orientation, is adjacent the wide end of a neighboring segment, in a second orientation, on either side.

19. The swage of claim **18**,wherein:

said segments in one of said first and second orientations is selectively held fixed and said segments in the other of said first and second orientations is movable.

20. The swage of claim **19**,wherein:

said segments each comprise a high location and at least some of said segments are movable to selectively align said high locations to obtain a maximum diameter or to offset them to attain a minimum diameter.

21. The swage of claim **20**,wherein:

said movable segments are biased in the direction to obtain said maximum diameter.

22. The swage of claim **21**,wherein:

said movable segments are driven as well as biased in the direction to obtain said maximum diameter.

23. The swage of claim **22**,wherein:

said movement of said movable segments toward said maximum diameter is in conjunction with a ratchet which prevents said movable segments from movement in a reversed direction.

24. The swage of claim **23**,wherein:

said segments that are held fixed are secured to a ring, whereupon relative rotation between said ring and said mandrel moves said segments formerly held fixed away from said movable segments to allow said body to move toward said minimum diameter.

25. The swage of claim **22**,wherein:

said movable segments are driven by a piston driven by fluid pressure applied to it through said mandrel; and

said bias is provided by a stack of Belleville washers.

26. The swage of claim **20**,wherein:

said mandrel has a longitudinal axis and said segments slide relatively to each other in the direction of said longitudinal axis.

27. The swage of claim **26**,wherein:

said segments are retained to each other while moving relatively to each other in a longitudinal direction.

28. The swage of claim **27**,wherein:

said segments are retained to each other at their abutting edges by a tongue and groove connection.

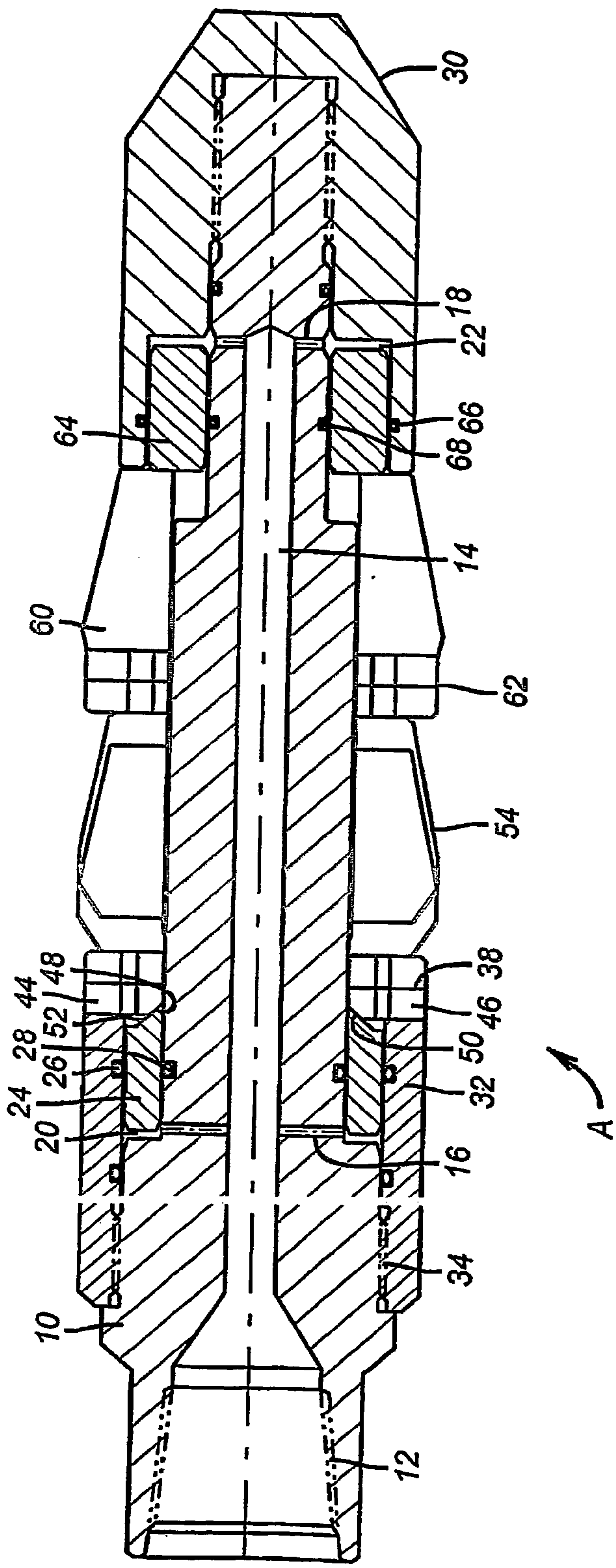

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FIG. 1

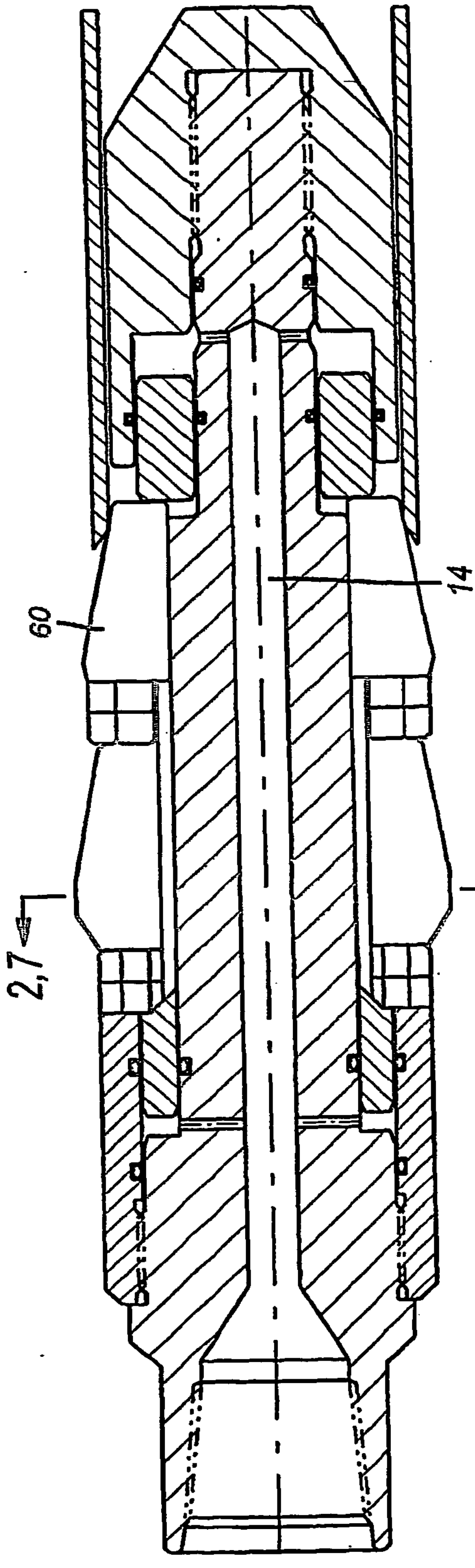

FIG. 2

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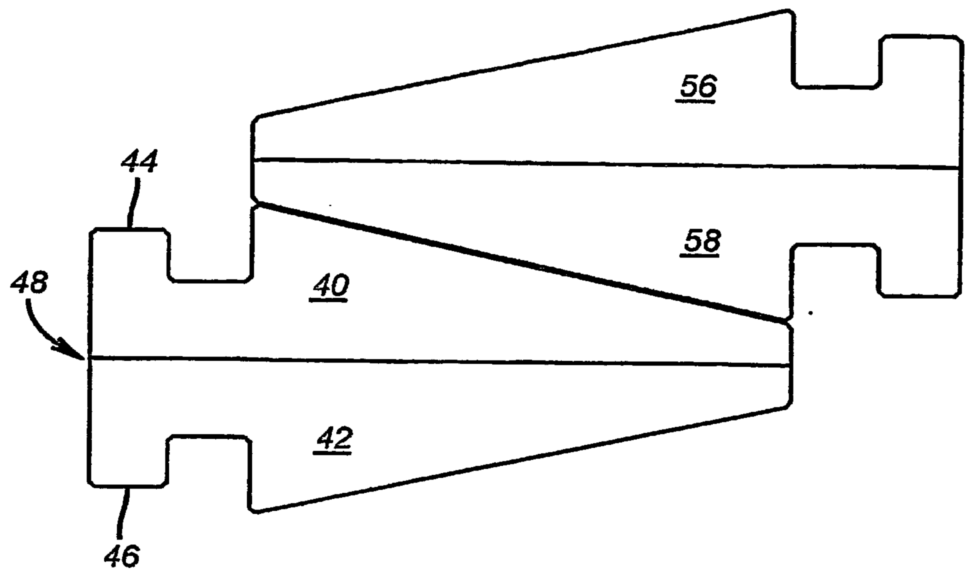

FIG. 3

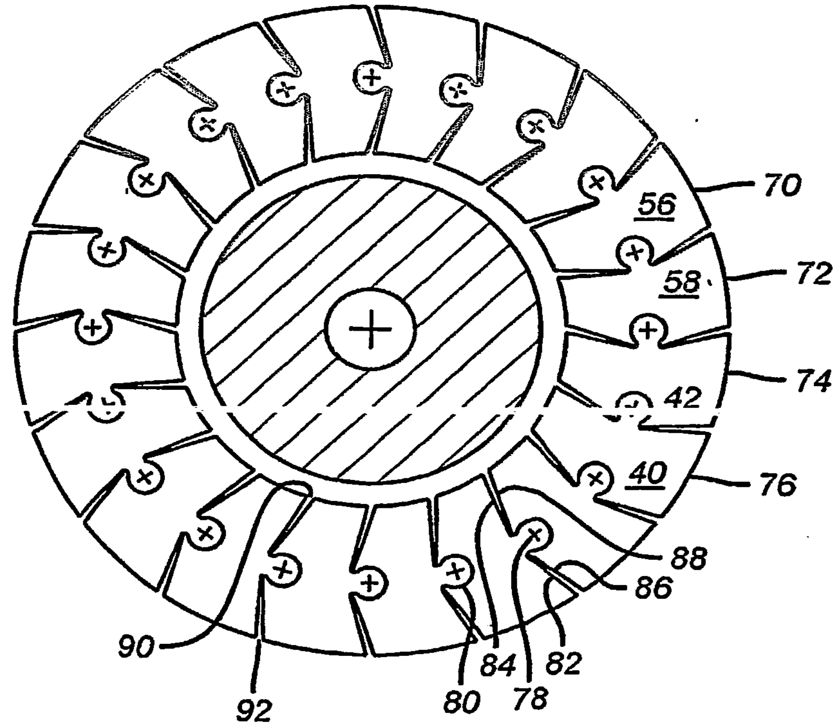

FIG. 4

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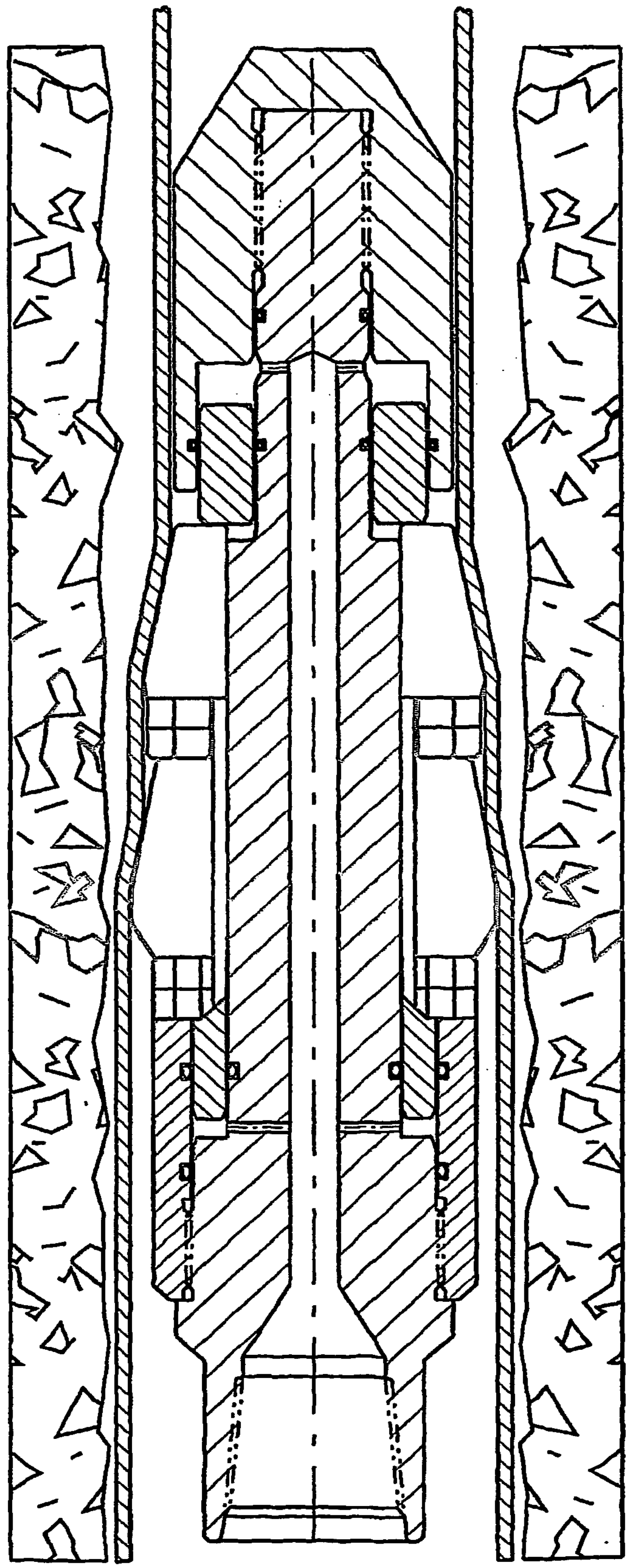

FIG. 5

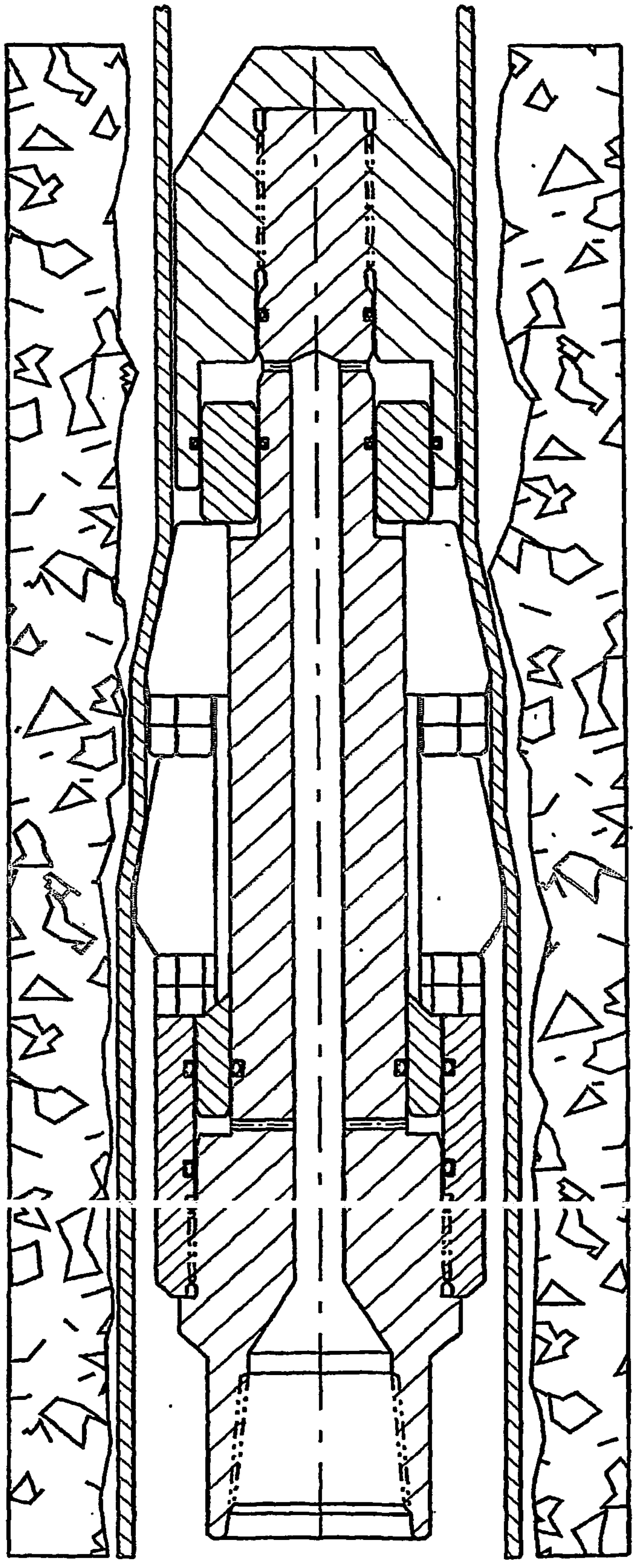

FIG. 6

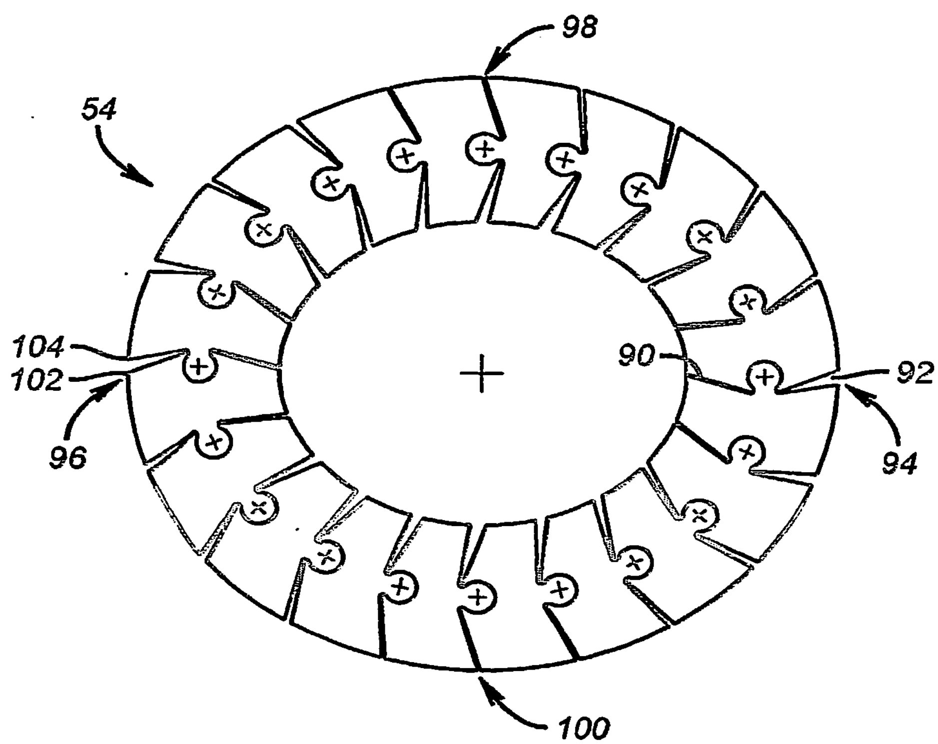

FIG. 7

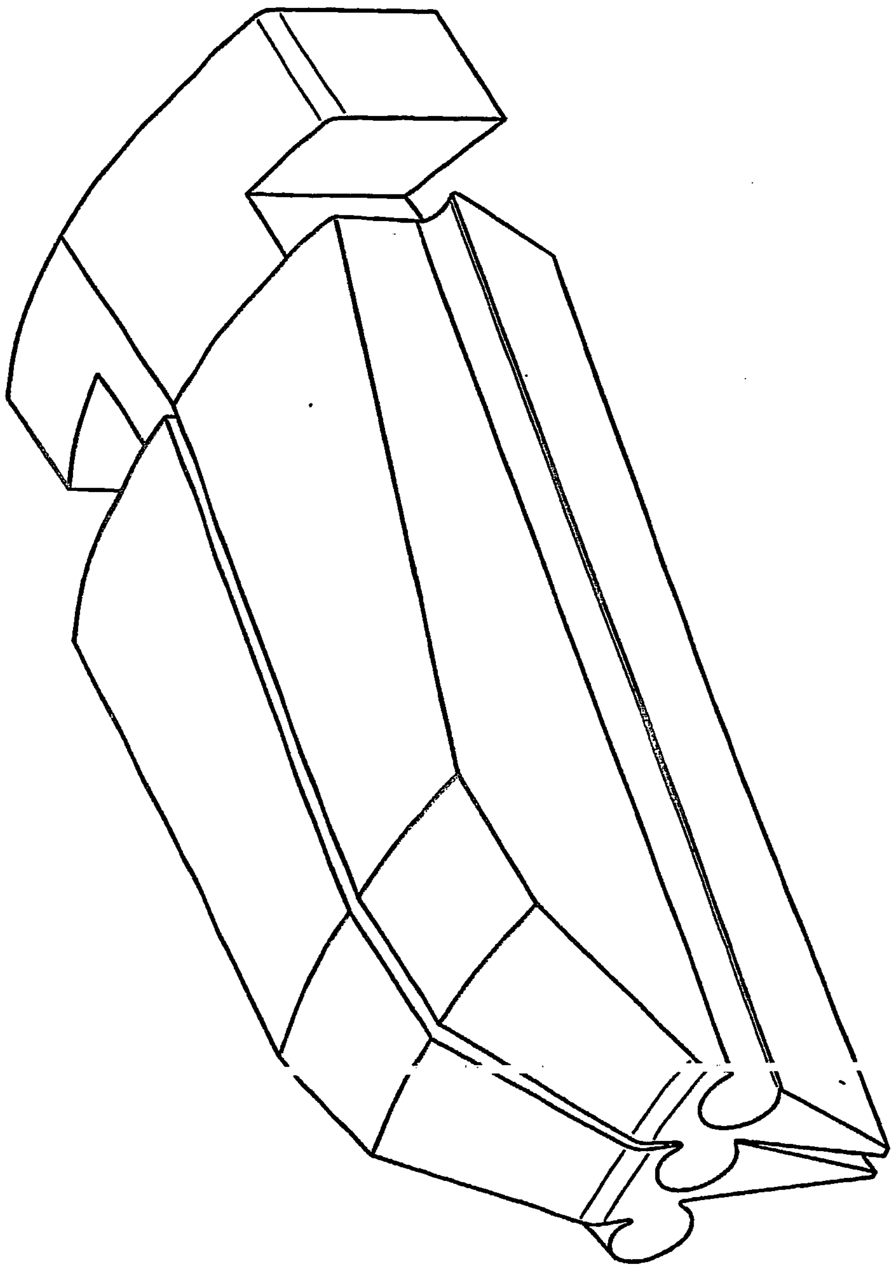

FIG. 8

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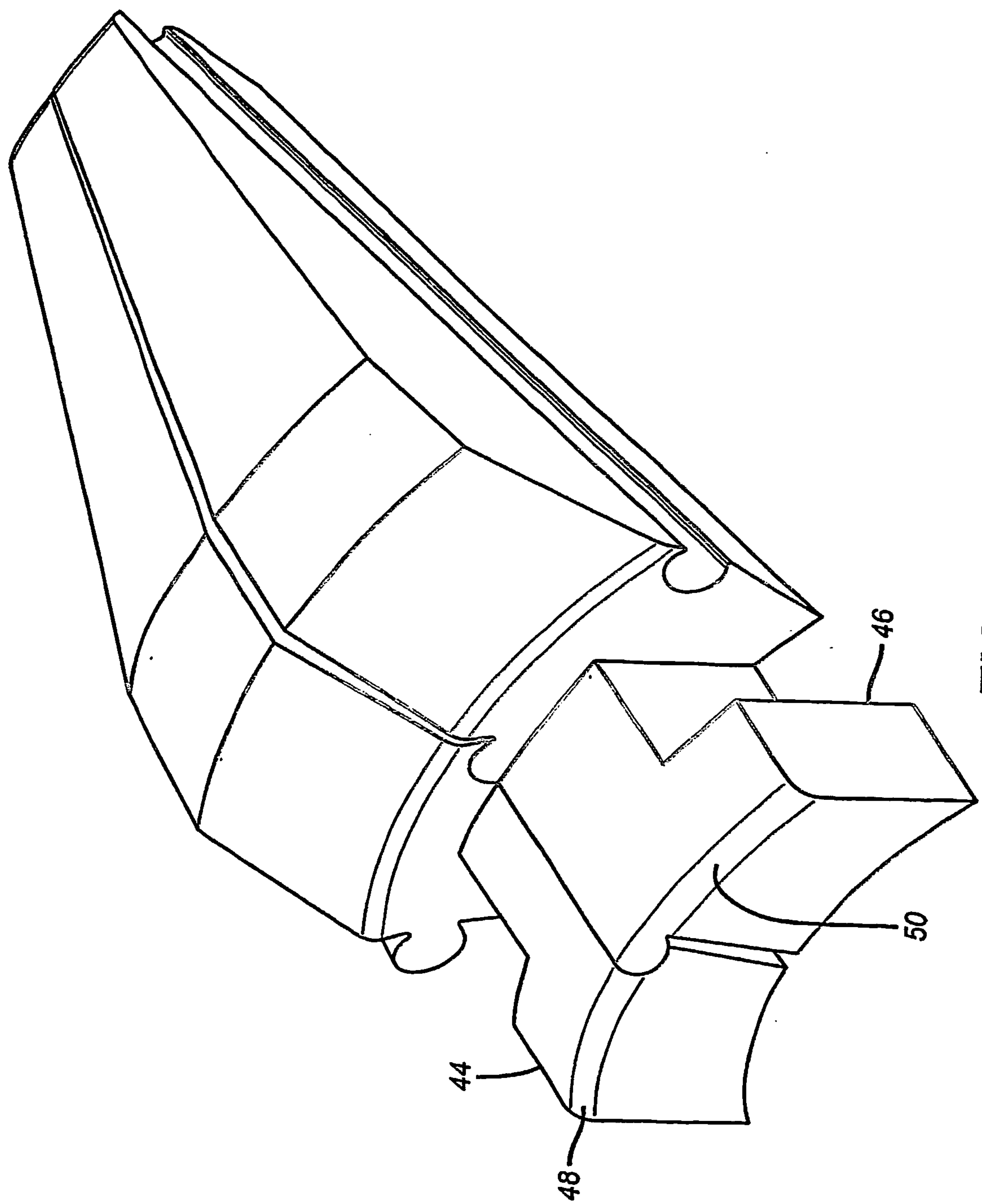

FIG. 9

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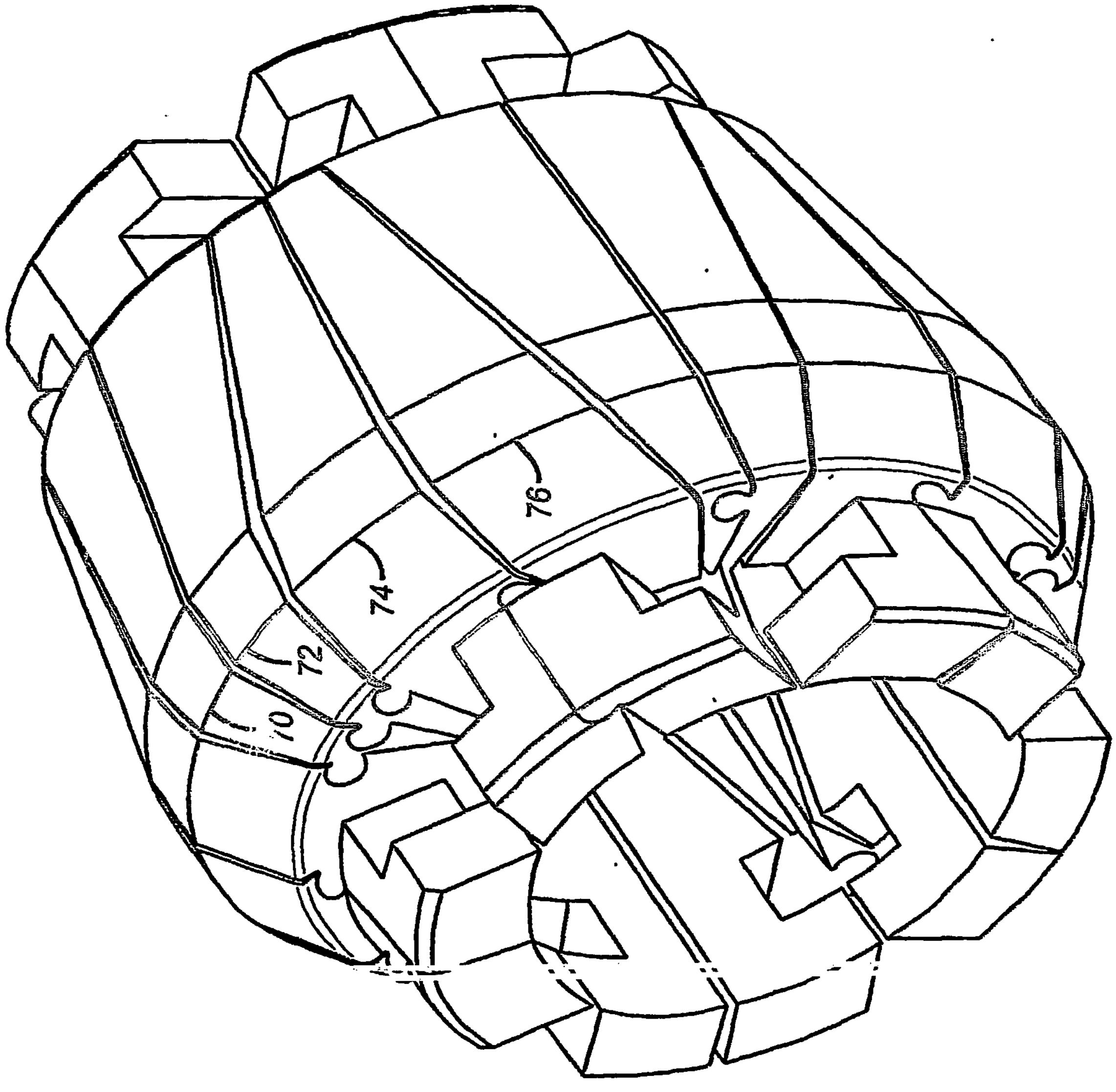

FIG. 10

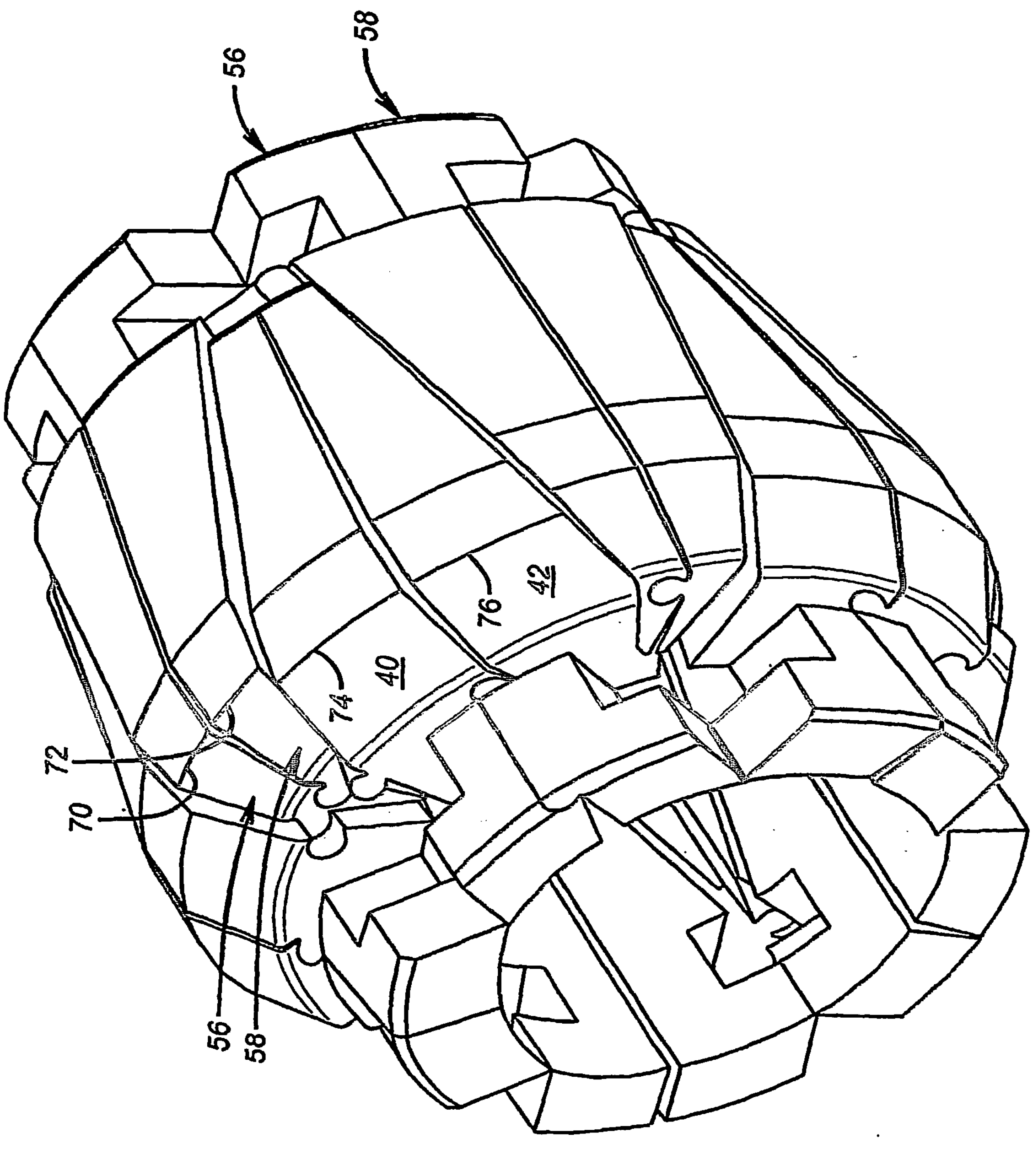

FIG. 11

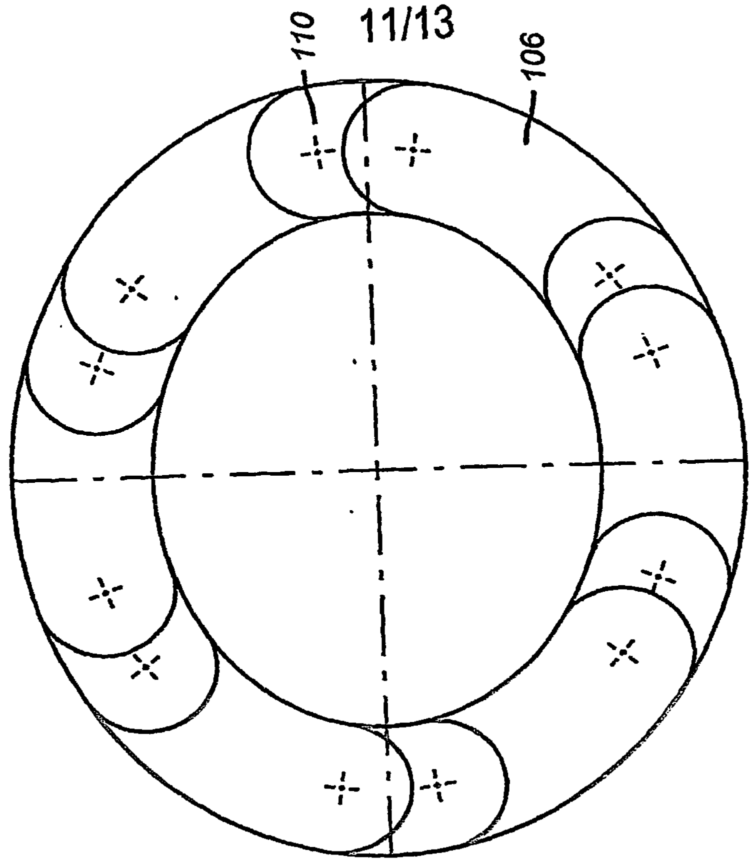

FIG. 13

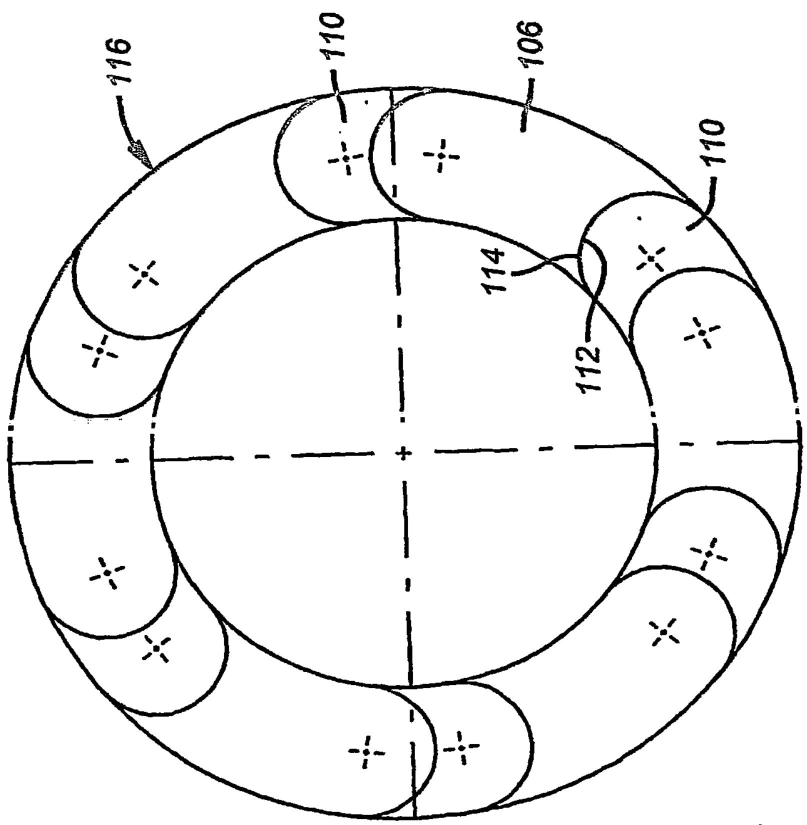

FIG. 12

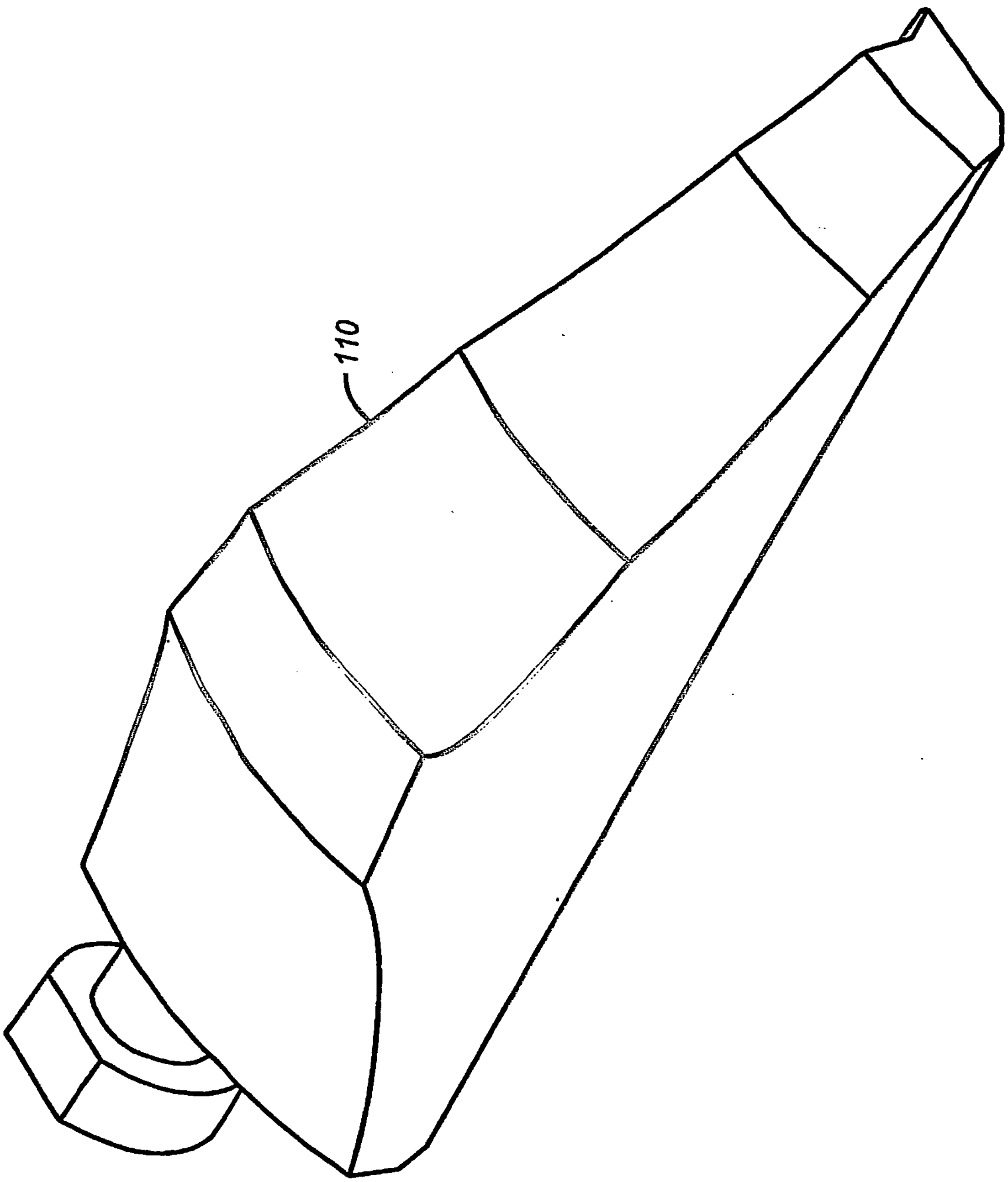

FIG. 14

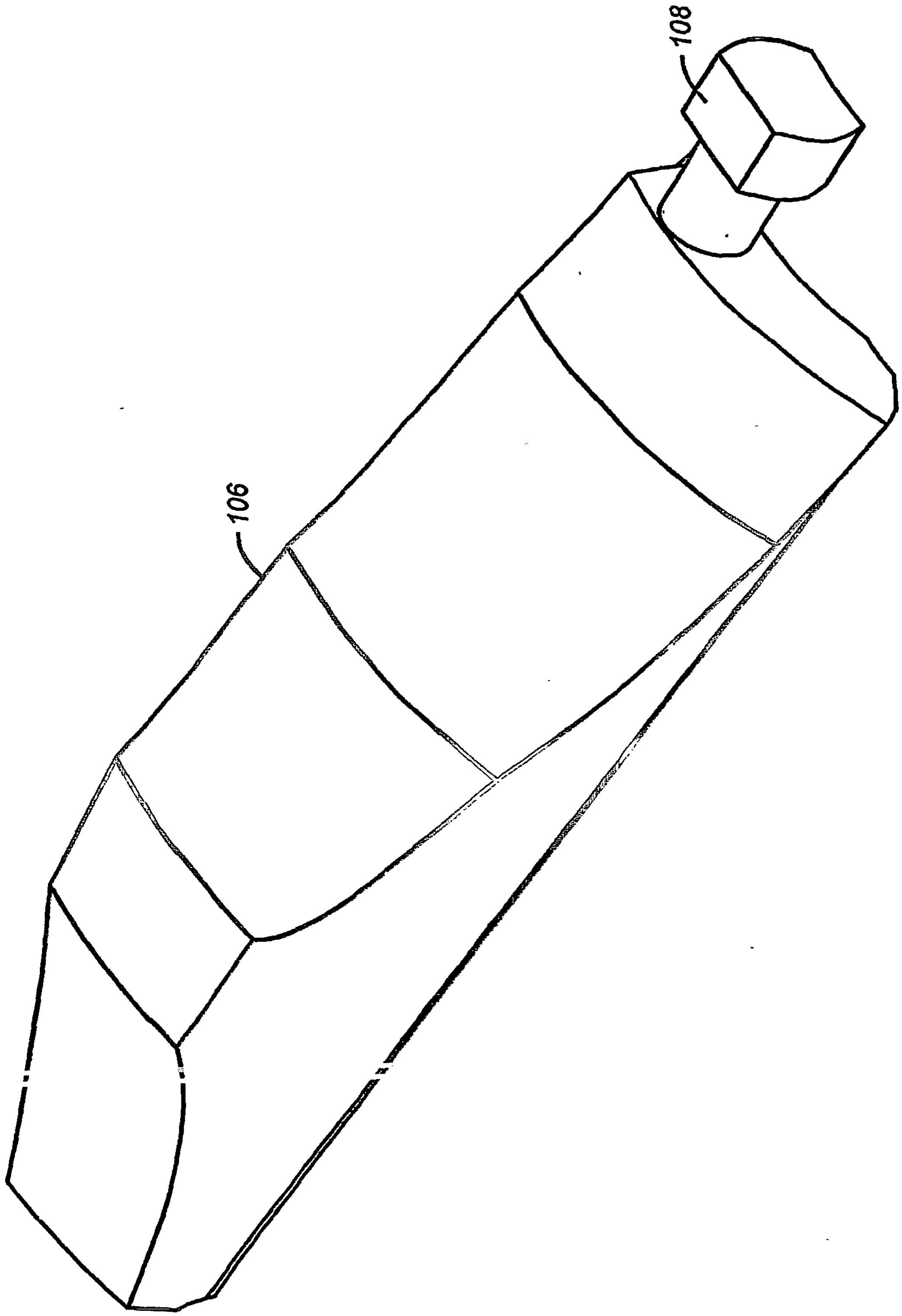

FIG. 15

INTERNATIONAL SEARCH REPORT

International Application No
PCT/US2004/002905

A. CLASSIFICATION OF SUBJECT MATTER
IPC 7 E21B43/10

According to International Patent Classification (IPC) or to both national classification and IPC

B. FIELDS SEARCHED

Minimum documentation searched (classification system followed by classification symbols)
IPC 7 E21B B21D

Documentation searched other than minimum documentation to the extent that such documents are included in the fields searched

Electronic data base consulted during the international search (name of data base and, where practical, search terms used)

EPO-Internal

C. DOCUMENTS CONSIDERED TO BE RELEVANT

Category °	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
X	US 6 450 261 B1 (BAUGH JOHN L) 17 September 2002 (2002-09-17) The subject-matter of claims 7-12 and 15-17 are considered obvious. column 2, line 5 - line 8 column 2, line 23 - line 43; figure 2 ---	1-17
X	US 2002/185274 A1 (SIMPSON NEIL A A ET AL) 12 December 2002 (2002-12-12) paragraph '0025!; figures 2,3 ---	1
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☐ Further documents are listed in the continuation of box C.

☒ Patent family members are listed in annex.

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Date of the actual completion of the international search	Date of mailing of the international search report
28 June 2004	06/07/2004

Name and mailing address of the ISA	Authorized officer
European Patent Office, P.B. 5818 Patentlaan 2 NL - 2280 HV Rijswijk Tel. (+31-70) 340-2040, Tx. 31 651 epo nl, Fax: (+31-70) 340-3016	Stroemmen, H.

INTERNATIONAL SEARCH REPORT

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